



# PERSI

Public Employee Retirement System of Idaho  
607 North 8<sup>th</sup> Street, Boise, ID 83702  
208-334-3365 or 1-800-451-8228

## PERSI CHOICE PLAN 401(K) Letter of Acceptance (2008)

The PERSI Choice Plan 401(k) is an eligible retirement plan as defined in IRC section 402(c)(8)(B). PERSI agrees to accept as trustee of the PERSI Choice Plan 401(k), eligible rollover distributions, as defined in IRC section 402(c)(4), from the following types of plans:

- qualified plans under IRC section 401(a) (including the PERSI Base Plan)
- qualified annuities under IRC section 403(a)
- tax sheltered annuities under IRC section 403(b)
- eligible governmental plans under IRC section 457(b)
- IRAs under IRC sections 408(a) or 408(b) (pre-tax only)
- SEP-IRAs under IRC section 408(k)
- Simple-IRAs under IRC section 408(p) (if the participant has participated for at least 2 years)

If the rollover distribution is coming from an eligible retirement plan as described above, please make the check payable to:

### **PERSI CHOICE 401(k) Plan, FBO (Participant name and Social Security No.)**

Send the check and the completed RS803 Request to Contribute Rollover Funds to the Choice Plan 401(k) form to the plan's record keeper:

**PERSI Choice 401(k) Plan  
BOX 360512  
Pittsburgh, PA 15251-6512**

*This is not a PO Box. It is a lock box for banking purposes.*

The participant's Choice Plan 401(k) account number is their Social Security Number. The plan number is 543413.

**NOTE: The completed "PERSI Choice Plan 401(k) Rollover Contribution Form" must accompany the check.**

Page 1 of the form provides the necessary authorization to place the contribution into the Participant's account in addition to investment instructions. Page 2 of the form, to be completed by your firm, confirms the funds are coming from a qualified plan. *A check sent without the required documentation cannot be placed in the participant's Choice Plan 401(k) account.*

The form is located on the PERSI web site ([www.persi.idaho.gov](http://www.persi.idaho.gov)) under the "forms" tab.

*Diane Kaiser, Manager, Employer Service Center & PERSI Choice Plan 401(k)*